Section Three: Retention

Overview: Strategies to Keep the Poll Workers You Want

The stars of Election Day are the poll workers who take pride in how well they manage the polling place. This section offers strategies to keep them coming back.

The principles used by corporations to retain good employees offer helpful guidance for election officials. Roger Herman's book on employee retention, **Keeping Good People**, includes the following principles:

- Cultivate strong personal relationships.
- Offer them the potential for growth.
- Reward them.

These strategies will help strengthen your relationship with individual poll workers. In turn, poll workers will strengthen their commitment to you. This section also includes strategies for increasing the benefits for poll workers that don't involve increasing the stipend. And we look at different methods for rewarding poll workers. In a 2006 survey of National Association of Counties (NACo) members, nearly 30 percent of the respondents said they conducted a post-election analysis to evaluate poll-worker performance.

Performance evaluations tell election officials which poll workers perform well or exceed expectations.



Chapter 17:

Evaluating Poll-Worker Performance

In This Chapter:

- Benefits of evaluating individual poll worker performance
- Evaluation methods
- Pitfalls and challenges
- Resources needed
- Adapting the program to your jurisdiction
- Tips for successful implementation

Poll workers, as well as election officials, need to know if they make errors.

Many jurisdictions rely on voter feedback to evaluate poll workers. Nearly a quarter of the jurisdictions that participated in the Spring 2006 NACo survey conduct polling place observations. Such methods yield valuable information, but they cannot substitute for a structured evaluation of poll workers.

A structured evaluation traces errors to individual workers or teams of poll workers. After Election Day, officials review registration lists, provisional ballot applications, ballot accounting and other paperwork, and record all errors. They give report cards to poll workers or teams. This information can help plan training sessions and Election Day support.

This post-election analysis takes time, effort and planning, but it is the only way an election official can obtain a clear view of what actually happened during the election. In addition, in the event of a legal challenge, election officials must have a way to account for errors.

In jurisdictions where poll workers rotate tasks, a structured evaluation requires a system to track who did what and when.

Poll workers can be evaluated on:

- Their attendance at training class.
- How well and how quickly they open the polling place.
- How successfully they find names in the voter registration list and supplemental lists.
- How correctly they process provisional ballot voters and related forms.



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- Their attendance at training class.
- How well and how quickly they open the polling place.
- How successfully they find names in the voter registration list and supplemental lists.
- How correctly they process provisional ballot voters and related forms.
- How well they direct lost voters to the correct polling place.
- How thoroughly they count ballots.
- How well and how quickly they close the polling place.
- How correctly and quickly they close reports and send the results and critical materials to election central.
- Their interactions with voters and other poll workers.

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- How thoroughly they count ballots.
- How well and how quickly they close the polling place.
- How correctly and quickly they close reports and send the results and critical materials to election central.
- Their interactions with voters and other poll workers.

The evaluation of such information helps election officials place poll workers in positions appropriate to their skills and abilities. Occasionally, election officials will use the information to decide not to rehire a poll worker. Such decisions are easier if the decision is based on evaluation data.

An evaluation also reveals who the Election Day stars are. Election officials can use the evaluation to reward excellent poll workers. In jurisdictions that offer opportunities to move into more responsible positions, evaluation data helps.

Data shows trends across precincts and helps identify issues in poll-worker training. For example, if many poll workers are making the same mistake on the ballot accounting form, the reason might not be incompetence. Check that the form is clear and that the training has been thorough.

The point of poll-worker evaluation is not to punish inadequate poll workers. It is a tool to improve accountability and the conduct of elections. If a challenge or a legal question arises after the election, officials need to recreate what happened at the polling place on Election Day. A system for evaluating poll workers will gives officials that ability.

Resources Needed

- Staff time both before and after the election. In one large jurisdiction, a staff member and part-time assistants spent six weeks conducting the evaluation. In a small jurisdiction, the post-election evaluation process took one staff member a week.
- A database tool such as Excel or Access, or an available poll-worker management tool.

Pitfalls and Challenges

• Telling poll workers about their errors requires sensitivity and care. If the problem is minor or unusual, work with the poll worker. If the problem is major, such as disenfranchising a voter, consider "retiring" the poll worker.

"It has been difficult to measure whether the evaluation program has led to improved poll worker performance because the poll worker's tasks change at every election," says the election director. However, the evaluation program does underscore that the completely integrated training program (the poll-worker manual, the training handouts, the performance evaluation, and supplies) directly leads to a more perfect Election Day. Everyone on the canvass team plays some role in the evaluation program.

"The bonus program costs approximately \$8,000 per election in bonuses. It was necessary to develop an extensive bar-code scheme. On Election Night, everything that comes back from the polls is scanned. The next day it must be uploaded to a spreadsheet that shows what is missing (the first potential point deductions) and shows us what we need to find immediately. Other elements of the matrix are worked on and the voting history is captured, the rosters are gone through for completeness, accuracy, etc. One staff person is responsible for keeping score as all materials are gone through, and then the Registrar reviews it at the end. Everyone on the canvass team plays some role in the evaluation program." (Lindsey McWilliams, Elections Manager, Humboldt County Elections and Voter Registration Division, CA)

 Longtime poll workers who have never been evaluated might bristle at first and regard the evaluation as a personal criticism. Election officials need to be clear that the evaluation is a tool for improving training and tracking how well poll workers are doing their jobs.
 And make it clear that you are evaluating their performances only, not themselves as human beings.

Adaptations

- In jurisdictions where poll workers rotate Election Day tasks, make the Precinct Leader accountable. Provide the Leader with forms to evaluate the performance of polling place staff. Conduct an analysis of how each polling place conducted the election – check-in procedures, provisional ballots, opening and closing — and go over the results with the Precinct Leader.
- In small jurisdictions, the evaluation process can be more personal. In one jurisdiction, the election official sends a note to the poll worker, along with a photocopy of the error and an explanation.

Tips for Successful Implementation

- A thorough evaluation requires planning before the election.
 Decide on the criteria and how performance will be measured. It might take several election cycles to establish measurable criteria and an appropriate grading system.
- Consider forming a work group of experienced poll workers to help develop the evaluation. Involving them in the process can help defuse potential resentment.
- Before training, inform poll workers that they will be evaluated.

Section 5: #39: Page from Poll Cat newsletter, LA County, CA.

Evaluation

The goal of a formal Poll-Worker Performance Evaluation Program is to help weed out non-performers and retain the most qualified poll workers.

One way to evaluate such a program is to take the poll-worker tasks — attendance at training, opening and closing polls on time, and correctly processing provisional voters — and to measure improvement from election to election.







Three Poll-Worker Performance Evaluation Models

Evaluating and Rewarding By Teams (Humboldt County, CA)

The Humboldt County, California Elections Department requires more than 400 poll workers to conduct a countywide election. Poll workers open and close the polls, issue ballots, keep track of who has voted, and, in some polling places where we have multiple precincts, serve as traffic directors guiding voters to the right precinct board. These tasks and the list of supplies and equipment (tracked via a bar-code scheme) are one axis of the evaluation matrix. The other axis has the poll-workers' names grouped by precinct board.

Election officers earn \$71 for serving as a Clerk and \$76 for serving as an Inspector. The County has conducted a poll-worker evaluation and reward program since 1999. If the precinct board satisfactorily completes their tasks and returns the supplies and equipment, each poll worker on the board receives a \$20 bonus. In the past two countywide elections, more than two-thirds of the precinct boards received their bonuses.

"It has been difficult to measure whether the evaluation program has led to improved poll-worker performance because the poll worker's tasks change at every election," says the election director, "however, the evaluation program does underscore that the completely integrated training program (the poll-worker manual, the training handouts, the performance evaluation, and supplies) directly leads to a more perfect Election Day. Everyone on the canvass team plays some role in the evaluation program.

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(Lindsey McWilliams, Elections Manager, Humboldt County Elections and Voter Registration Division, CA)

Section 5: #40: Evaluation Matrix, Humboldt County, CA

Section 5: #41: Poll-worker feedback materials, Humboldt County, CA



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Evaluating Poll-Worker Performance (Allen County, OH)

Allen County's poll-worker evaluation program began in 2001. Focused on three major areas -- poll books, ballot summary sheets and returning materials. We determined that we should probably deal with the 10 most important items in each category so as not to get too complicated. Over the past five years we have made minor adjustments and modifications. We constantly de-brief and review our process, looking for improvements. The key to keeping this from becoming an overwhelming project is incorporating the evaluation form into our established processes. In other words, we unpack in teams ... one member fills out the evaluation form while the other unpacks. We complete the poll book form as we review the poll book from each precinct, likewise with the ballot summary sheet. As we review each summary sheet, we are guided by the evaluation form.

We do not send a letter to the poll worker. We review the summary sheets personally with the precinct's Presiding Judge at the next training session – that way we can answer questions – if they have any. We then rely on the Presiding Judge to share the information with the others and oversee implementation.

Recently, we began something new ... we held a voluntary debriefing session with our Presiding Judges and Assistant Presiding Judges. We let them speak to us regarding their Election Day experiences. It went exceptionally well. One of the things we found out was that they didn't really understand what 'standards' we were using in our evaluation of their work. Other than the fact that it is all covered in our Poll Workers Procedure Manual, we couldn't answer their question. So we are now working on just such matrix or standards guide.

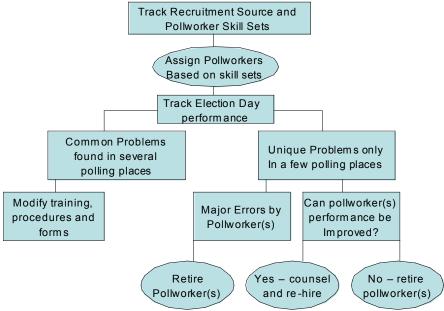
We have seen dramatic improvement. First, this process has helped us refine our teaching curriculum in ways that more directly address problems. Second, It helps poll workers better understand specific errors and solutions.

Our success in this I believe is to present it in a non-threatening way to the poll workers. Our approach has always been that basic goal is for the purposes of refining our education process. The first error is on us ... perhaps we didn't teach well enough. From there it is to determine if you, the poll worker, are listening as well as learning, thus the second error is on you. From there it allows us to track whether or not we have ongoing problems with the same folks making the same errors over and over, in which case we might need to move them out of their position. (Keith Cunningham, Director, Allen County Ohio Board of Elections)





POLLWORKER PERFORMANCE TRACKING



Sample Discussion of Poll Worker Evaluation Program

PROFESSIONAL PRACTICES PROGRAM 2006

EVALUATING ELECTION JUDGE PERFORMANCEThe RTE (Recruitment/Training/Evaluation) to Success!

MONTGOMERY COUNTY, MARYLAND Contact: Sara Harris <u>sara.harris@montgomerycountymd.gov</u> 240-777-8522

Top quality election judge precinct performance is an essential element for successful voter service and well-conducted elections. Precinct election officials or early voting election officials can benefit from a well-planned, solidly implemented and integrated Election Judge Recruitment, Training and Evaluation program. Election Judge Evaluation is the third and necessary leg of a quality structure and voter service system.

The Montgomery County Board of Elections integrated a 3-part Election Judge Evaluation Program with Recruitment and Training, the Recruitment/Training/Evaluation (RTE) to success!

Part I - an in-depth analysis of election day documentation returned by election judges.

Part II - an Election Judge Performance Report prepared by trained observers.

Part III - a peer-to-peer survey conducted by Board of Elections staff after election day.

For the full text of this Professional Practices Paper, contact Sara Harris, sara.harris@montgomerycountymaryland.gov

Chapter 18:

Communication Strategies

In This Chapter:

- Employing a poll-worker newsletter
- Communicating with poll workers before Election Day
- Communicating with poll workers on Election Day
- Post-election resources and tips

One way to retain volunteer poll workers is to keep in contact with them and keep them informed. According to the NACo survey, one in five jurisdictions sends regular newsletters. Nearly one in 10 reviewed the Election Day by meeting with them later or sending them a report.

Use regular communication with poll workers to:

- Affirm the value of the poll worker to the election office.
- Say "thank you" to poll workers.
- Build a sense of community.
- Help keep mailing addresses (or email addresses) up-to-date.

Using Poll-Worker Newsletters as a Communication Tool

Use the newsletter to prompt poll workers to contact the elections office. For example, tell poll workers the dates of upcoming elections and provide a "tear off" sign-up form for them to complete and return. On the form, include any information about positions they'd like to work. Also ask for updated contact information and feedback about their last experience. Make sure to ask for comments and updated contact information, including email addresses.

Challenges

- Printing newsletters can be expensive; mailing them can be even more expensive. Consider email as an alternative.
- Responding to feedback can be time-consuming.

Resources Needed for This Program

 Depending on the experience of the person assigned to develop the newsletter, MS Word is a basic option and



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- Help keep mailing addresses (or email addresses) up-to-date.

PageMaker or MS Publisher are other options. MS Word offers several templates for creating professional-looking newsletters.

Tips for Developing and Maintaining a Newsletter

Content:

- A review of the last election and plans for improving the process
- Changes or possible changes in legislation
- Training schedules and other important dates
- Opportunities for advancement within the poll-worker program
- A feature on special poll workers to reward and strengthen commitment (bilingual poll workers, poll workers who help in recruiting, poll workers who go above and beyond the call of duty, poll workers with interesting backgrounds)
- Recruitment messages including a list of precincts where poll workers are needed
- A questionnaire for future election assignments and availability

Design and Dissemination:

- Consider asking a poll worker or community organization to produce the newsletter.
- Send electronic newsletters or briefings via email to those who have email.
- Put reserve and potential workers on the newsletter list.
- Provide copies of the newsletter at training classes to save the cost of mailing.

Evaluate your Newsletter Efforts

- In a post-election debriefing, ask poll workers if the newsletter is worth it. Ask how to make it more engaging.
- Is producing and distributing a newsletter sustainable?
 What is its impact on other priorities?
- Is it measurable? Can you track how much time and money the newsletter costs? Can you gauge whether it helps make poll workers feel better informed? How much does

"We communicate with our 22,000 poll workers via a poll worker newsletter, called The Poll Cat. We mail the newsletter prior to every major election and it serves at least three purposes: (1) Educates poll workers on the county's initiatives, (2) Briefs poll workers on key procedures, (3) Highlights interesting poll workers, and repeatedly seeks input from and gives thanks to the poll workers. It's a lot of work to produce a newsletter that is informative and fun, but we receive such great feedback that it's worth it." (Wanda Hamilton, Poll Cat Editor, Los Angeles County)

"It's the kiss of death to have a volunteer's name on a list and not stay in touch with them more than once or twice a year." (Tyra Williams, Alpha Kappa Alpha Sorority, Washington, DC)



it help your retention rates? Does it encourage poll workers to become involved and take pride in their performance?

Section 5: Sample #44: Poll Cat newsletter, Botetourt Co, VA Section 5: Sample #45: EBO newsletter, Clark County, NV Section 5: Sample #46: Making It Count: Poll Worker Bulletin, King County, WA

Communicating with Poll Workers before Election Day

- Before Election Day, poll workers may have questions about training session dates, locations and procedures. Poll workers must know how to contact the election office – the proper person to call and the phone number. Set up systems so poll workers can find information on their own.
- Encourage poll workers to use email. It takes less time, especially when you create standardized email responses to frequently asked questions (FAQs).
- Consider posting an FAQ page for poll workers on your website.
- Before Election Day, send a review of the most important things to remember.
- As Election Day approaches, prepare for an increase in the number of calls from poll workers. Make sure everyone updates voice mail messages to indicate when the caller can expect a response (within 24 hours).
 Designate people to field calls from poll workers and judges, or to work with poll workers by voting district and precinct.
- It is important that your poll workers know how to reach you on the day before Election Day. Unanswered questions about polling-place assignments and locations can mean the difference between a polling place opening on time or opening late.
- "Ask Wanda." One jurisdiction has distributed a form in poll-worker training classes asking "Wanda" (a longtime poll worker who now works in the election office) for help. The form helps poll workers feel that someone is there to answer training questions. It also provides an opportunity for poll workers to vent their frustrations to the election office.

Section 5: #47: "Ask Wanda", Los Angeles County feedback form













Communicating with Poll Workers on Election Day

It is most important to communicate with poll workers on Election Day, especially at peak times before the polls open and after the polls close.

- Jurisdictions now regularly give their poll workers cell phones to use on Election Day to facilitate communication.
 Tip: Do not assume all poll workers know how to use a cell phone. Include cell phone operation as part of your training.
- In some jurisdictions, poll workers are directed to call an area Field Technician, not the central office, when they encounter problems. In turn, the central office calls the area Field Technician when it learns about problems with voters or monitors.
- The central office number to call for help on Election Day is one of the most important pieces of information given to poll workers in training sessions. The process for requesting help must be repeated several times during training and in training materials. After the election, ask poll workers if they had problems communicating with the central office. Look for ways to expand technical support, reevaluate help-desk staffing level and procedures, or upgrade your phone system.

Post-Election Resources and Tips

- Provide feedback forms during the training sessions and on Election Day. Encourage poll workers to write down questions, comments, ideas or solutions. Spotlight any new procedures developed as a result of poll-worker feedback. Reinforce the importance of their initiatives to the entire process for future elections.
- Poll-worker survey A post-election survey can provide valuable information on how well components of the pollworker program are working.
- Set up a voice mailbox or an email address for receiving feedback from poll workers after the election.

Section 5: Sample #48: Letter to poll workers, Napa Valley, CA

Section 5: Sample # 49: Poll worker survey developed for EAC pilot jurisdictions' poll workers





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Chapter 19:

Tools and Tips to Bring 'Em Back

In This Chapter:

- Offer Excellent Training
- Offer Special Recognition at Training Class
- Provide Incentives for Election Day
- Pay Well and Pay Quickly
- Say Thank You
- Certificates of Appreciation
- Poll-Worker Appreciation Ceremonies
- Establish a Certification Program
- Statutory Requirements and Impediments

Poll-worker retention takes effort, energy and resources, but the results are worth it. Elections office staff must work with support and nuture poll workers – those indispensable citizen-volunteers who run the elections in the precincts.

According to focus-group participants, the main reason poll workers return is that they enjoy the people they work with. Let your poll workers know you appreciate them. Thank them. Here are some ways to do that:

Offer Excellent Training

By providing poll workers with the tools and knowledge to run an election smoothly, you give them confidence, and they will return.

- Use discussion of techniques, Microsoft PowerPoint, hands-on training, exercises and, when appropriate, show a sense of humor.
- Some jurisdictions prefer to mix new and experienced workers in the same classes; others prefer to separate them according to their assigned Election Day position.

Give Special Recognition at Training

Begin training sessions by recognizing individual poll workers. For example, acknowledge those who were recently married, celebrated a special event, won recognition or distinguished themselves in some way:

- Give special ribbons for the number of years served.
- Offer door prizes.
- Supply refreshments at training.

"Confidence-building is what we're about."

(Sally Pujol, Precinct Operations Manager, Sacramento CA)

"A well-informed poll worker is a happy worker." (Karen K. Hartenbower, County Clerk/Election Officer, Lyon County, Kansas)





- Provide patriotic lapel pins.
- Provide name badges.

Section 5: #50: Poll Worker Badge, King County, WA

Providing Incentives for Election Day

These might include:

- Bags for poll workers to take personal items to the polls
- Lanyards for name tags
- Survival packets including candy, band-aids, aspirin and Handy Wipes
- Election-specific lapel pins
- Cookies or other food and drinks on Election Day

Section 5: #51: photo of Lyon County's tote bag

Pay Poll Workers Quickly and Accurately

Tell poll workers when they can expect to be paid. Often poll workers are paid on the same bi-weekly cycle as the local government employees, so payday can be up to two weeks after the election. Make sure pollworkers know this.

Poll workers will become frustrated if the stipend they receive is incorrect and they have to spend time and effort getting it corrected. Prompt payment lets you show appreciation for the job that they do.

Saying Thanks

Volunteer-management experts stress the importance of saying "thank you" to your volunteers. Many poll workers who participated in focus groups around the country, however, said they do not remember being thanked for their service. Perhaps election officials need to say it louder. For example, election officials who provide doughnuts and coffee at the polls need to make it clear that they do so because they appreciate the service poll workers provide.

Of the jurisdictions responding to the NACo membership survey, one in 10 sent certificates of appreciation to their poll workers, two in 10 gave them ribbons, lapel pins or other tokens of appreciation and one in 60 sent thank-you letters.





Note: Although many poll workers do appreciate the incentives, those who participated in League of Women Voter's focus groups did not consider them a form of thanks. And finding the funds to provide incentives can be a challenge.



Stage an Event

Consider partnering with elected officials to host a poll-worker reception or awards ceremony. This takes more work than thank-you letters, but it may have greater impact. Such an event:

- Publicly affirms the value of poll workers to your office and the government.
- Provides an enjoyable social occasion.
- Strengthens ties among poll workers and fosters a sense of community.

Resources:

- Staff time to coordinate the event and invite poll workers
- · Cost of invitations
- Cost of the event, which can include renting space and catering costs

Pitfalls or Challenges

- The cost might be prohibitive.
- Some jurisdictions have rules against spending money for entertainment.
- Accidentally leaving somebody off the invitation list can create hard feelings.

Adaptations, Variations and Tips

- For small jurisdictions with limited resources or for jurisdictions, where state law prohibits spending money for entertainment, consider a potluck event or series of potlucks. Poll workers can enjoy the opportunity to socialize without the stress of an election.
- Find a partner to provide the food for the event.
- Make sure the invitation list is accurate.

Conduct a Poll-Worker Appreciation Ceremony

Invite your poll workers to a special event in their honor. Ask local elected officials and the media to attend. Give special recognition to those who have worked more than one year and those who have performed well.





Guests who come to celebrate with the poll workers are potential new poll workers. A ceremony gives you great publicity, and raises the awareness of the need for poll workers

Ask whether the food can be donated by a local grocery store.

Ask the local League of Women Voters to greet the poll workers as they arrive.

Present door prizes and give each worker a token of recognition, e.g. a flower donated by your neighborhood florist.

Award certificates of appreciation at the event, including special recognition of those with longer service.

Model Program

In Pennsylvania, more than 300 poll workers and their families attended a ceremony honoring poll workers who had worked 10 years or more. Each honoree received a certificate and a flag. Six workers who had served for more than 50 years also received a rose and a letter of commendation from the state's highest election official.

Establish a Training Certification Program

Those workers who complete the class can be paid more. The training consists of specific classes on procedures and laws at the precinct level.

To become certified, workers must attend a specified number of class hours and pass a test on the information presented in the class. This program creates a pool of dedicated workers who will return year after year.

Other Ways to Show Appreciation

- Greet workers who return supplies with a smile.
- Convince local businesses to provide discount coupons for poll workers.
- Send personalized thank-you letters or cards, preferably handwritten.
- Have your jurisdiction proclaim and publish Poll Worker Appreciation Month every November.
- Send birthday letters and, for other major life events, greeting cards.

"I think that when President John F. Kennedy said, 'Ask not what your country can do for you; ask what you can do for your country,' he described Lawrence County Poll workers." (Marlene D. Gabriel, Director, of Voter Registration and Elections, Lawrence County PA).

"Once they invest that much time and effort into becoming certified, they don't walk away. They stick around." (George Gilbert, Director of Elections, Guilford NC).





Model Program

At least two jurisdictions work in cooperation with their local community college. To receive certification in one jurisdiction, the poll worker must attend 18 class hours. Approximately 40 percent of their workers are now certified. Retention in that county has run from 78 to 90 percent. In another jurisdiction, poll workers receive college credit for attending training sessions.

Statutory Requirements and Impediments

State laws may have an impact on poll-worker retention programs. They include:

Certification or training requirements for poll workers, which set minimum standards for poll-worker performance and knowledge. Some might fail the certification process. Or you may need to dismiss a poll worker who has passed the certification process. A statewide certification or training process addresses both.

- Duration of term: Many states specify the length of term for serving as a poll worker. Election officials who consider adopting a poll-worker evaluation program may be required to keep poll workers through the end of their term, even if their performance is poor.
- Poll-worker pay: If poll-worker compensation is set by state law and you believe the payment level is insufficient, consider other forms of compensation. Not all rewards need be monetary. For example, young poll workers might show progressive levels of proficiency on their resumes. Point out that serving as a Precinct Leader looks good on a law school or job application.
- Rules prohibiting use of public funds for entertainment:
 Know the rules about spending money for entertainment before planning a reception or event to thank your poll workers.

